



Serial letter

ADITO Software GmbH

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Screenshots

The UX design of ADITO is continuously optimized for you. There may therefore be deviations in the screenshots.





AGENDA

Agenda

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Serial letter

Overview

- A serial letter is used to send a letter to **many recipients**.
- Recipients can be **Contacts** or **Companies** that are active.
- In the tab „**360 Degrees**“ in the Context „Contact“ or „Company“, all linked serial letters are displayed.
- The communication settings of a Contact or Company are to be taken into consideration.

Serial letter: participation confirmation



Document template with placeholders



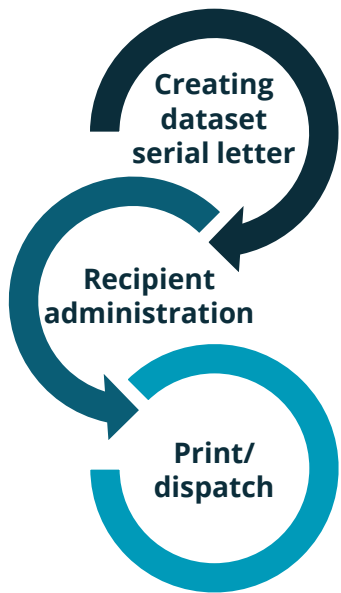
Recipients



Personalized letter for all participants

Serial letter

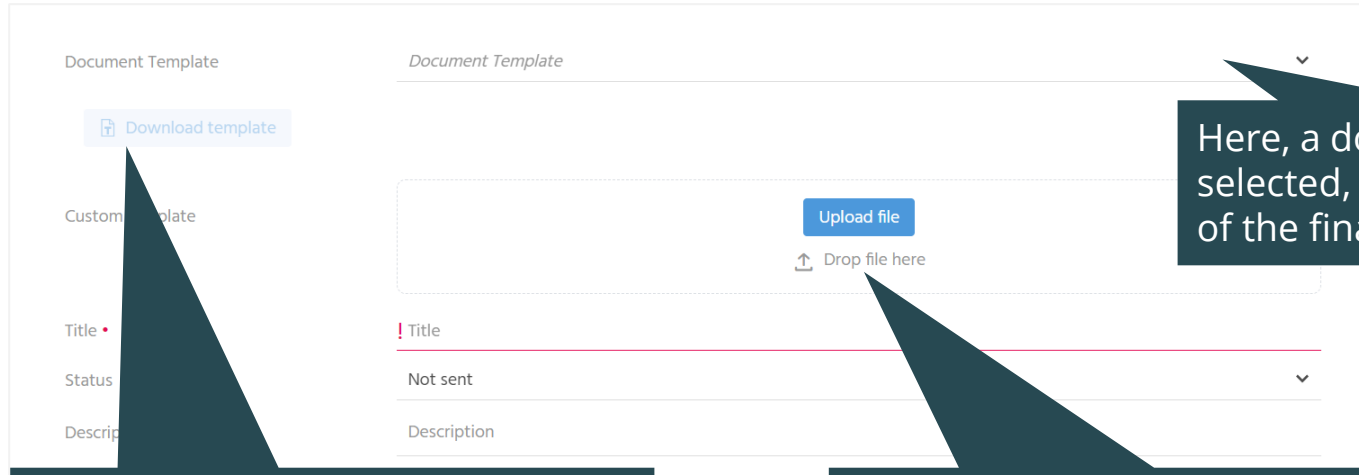
Procedure of creating a new serial letter



- When creating a serial letter, select a document template.
- You can add multiple recipients to a serial letter at once using the serial action in the filter view of the “Contact” or “Company” contexts.
- You can add individual recipients using the “Add to serial letter” action (preview of Contact/Company) or in the “Recipients” tab in the serial letter.
- You can only add active contacts/companies to the serial letter.
- To send the letter, either create a document containing the letters for all recipients or download the letter for a single recipient.

Serial letter

Create new



Document Template

Document Template

Download template

Custom template

Upload file

Drop file here

Title

Status

Description

Here, a document template is selected, which already consists of the final content of the letter.

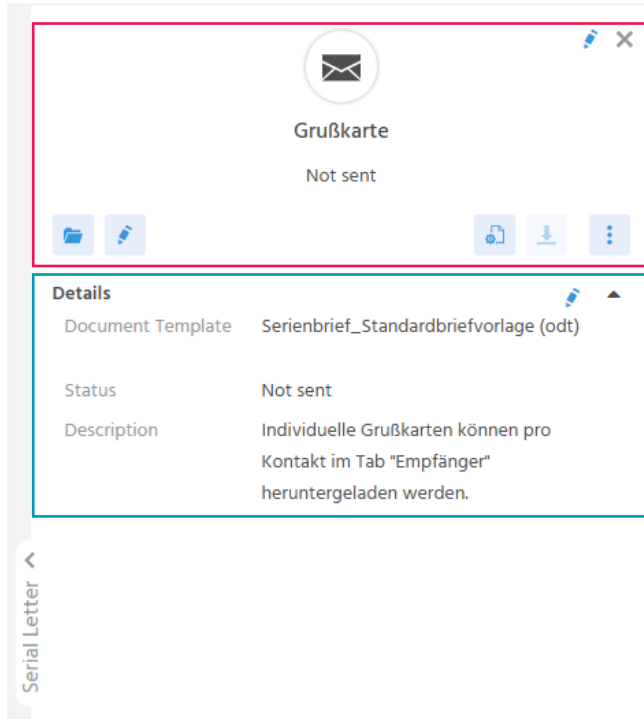
If the selected document template should be viewed and/or edited, it can be downloaded through the Action „Download template“ and be locally opened for editing.

User-defined templates:

- Either re-upload the file that was previously downloaded and edited or
- Upload a new file (ODT format).

Serial letter

Preview



In the **Header**, name, status and the following specific Actions are displayed:

-  Generate letter
-  Download letter
-  Download template

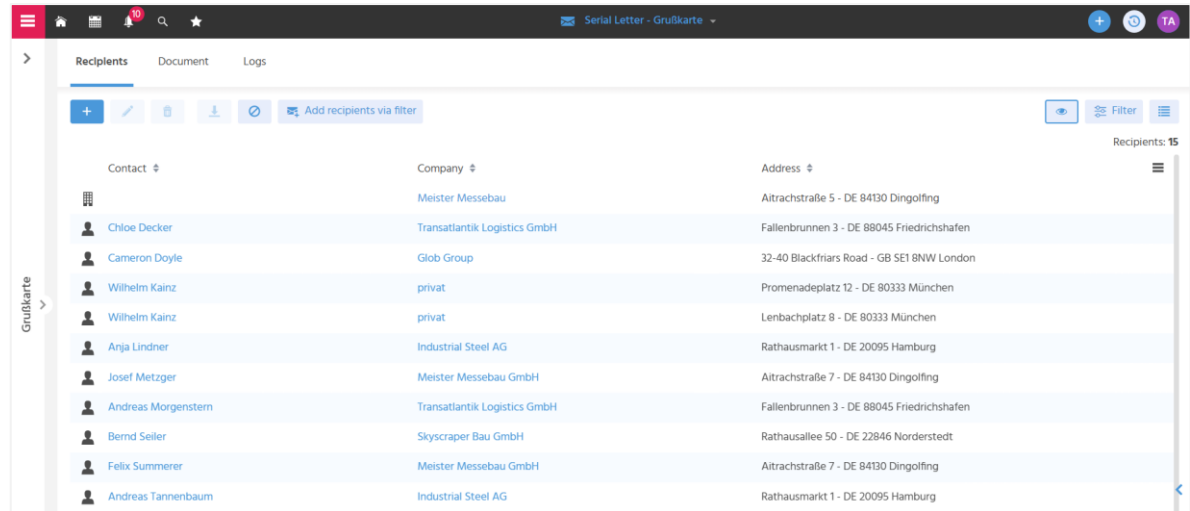
The area **Details** shows:

- Name of the document template
- Status
- Description

Serial letter

Recipient administration in the tab „Recipients“

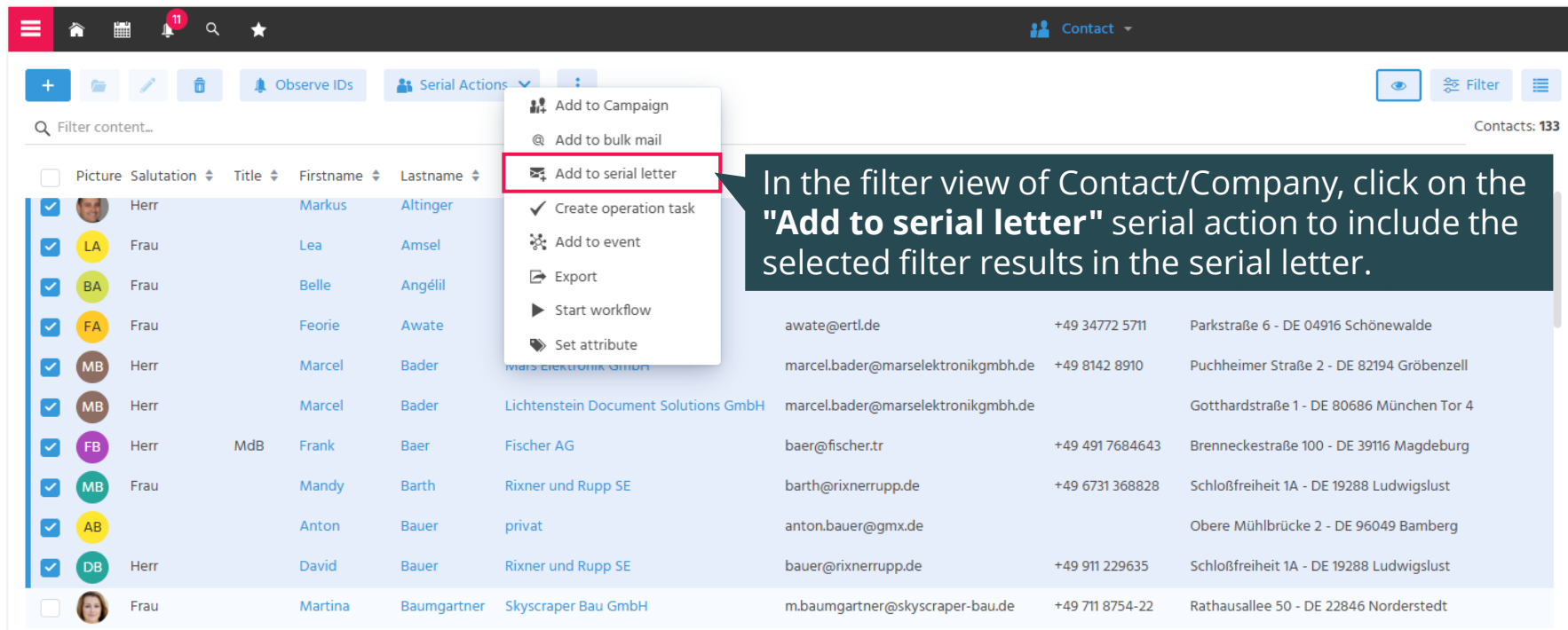
The recipients are displayed in the equally named tab in the serial letter. Here, you have the option of adding **individual recipients** (active Companies or Contacts) or removing them using the delete button.



Contact	Company	Address
	Meister Messebau	Aitrachstraße 5 - DE 84130 Dingolfing
Chloe Decker	Transatlantik Logistics GmbH	Fallenbrunnen 3 - DE 88045 Friedrichshafen
Cameron Doyle	Glob Group	32-40 Blackfriars Road - GB SE1 8NW London
Wilhelm Kainz	privat	Promenadeplatz 12 - DE 80333 München
Wilhelm Kainz	privat	Lenbachplatz 8 - DE 80333 München
Anja Lindner	Industrial Steel AG	Rathausmarkt 1 - DE 20095 Hamburg
Josef Metzger	Meister Messebau GmbH	Aitrachstraße 7 - DE 84130 Dingolfing
Andreas Morgenstern	Transatlantik Logistics GmbH	Fallenbrunnen 3 - DE 88045 Friedrichshafen
Bernd Seiler	Skyscraper Bau GmbH	Rathausallee 50 - DE 22846 Norderstedt
Felix Summerer	Meister Messebau GmbH	Aitrachstraße 7 - DE 84130 Dingolfing
Andreas Tannenbaum	Industrial Steel AG	Rathausmarkt 1 - DE 20095 Hamburg

Excursus to the Contexts „Contact”/”Company”

Adding recipients by Serial Action



Contacts: 133

Filter content...

Serial Actions

- Add to Campaign
- Add to bulk mail
- Add to serial letter**
- Create operation task
- Add to event
- Export
- Start workflow
- Set attribute

In the filter view of Contact/Company, click on the "Add to serial letter" serial action to include the selected filter results in the serial letter.

Picture	Salutation	Title	Firstname	Lastname	Company	Email	Phone	Address
☐	Herr		Markus	Altinger				
☒	Frau		Lea	Amsel				
☒	Frau		Belle	Angélil				
☒	Frau		Feorie	Awate				
☒	Herr		Marcel	Bader	Mars Elektronik GmbH			
☒	Herr		Marcel	Bader	Lichtenstein Document Solutions GmbH			
☒	Herr	MdB	Frank	Baer	Fischer AG			
☒	Frau		Mandy	Barth	Rixner und Rupp SE			
☒			Anton	Bauer	privat			
☒	Herr		David	Bauer	Rixner und Rupp SE			
☐	Frau		Martina	Baumgartner	Skyscraper Bau GmbH			

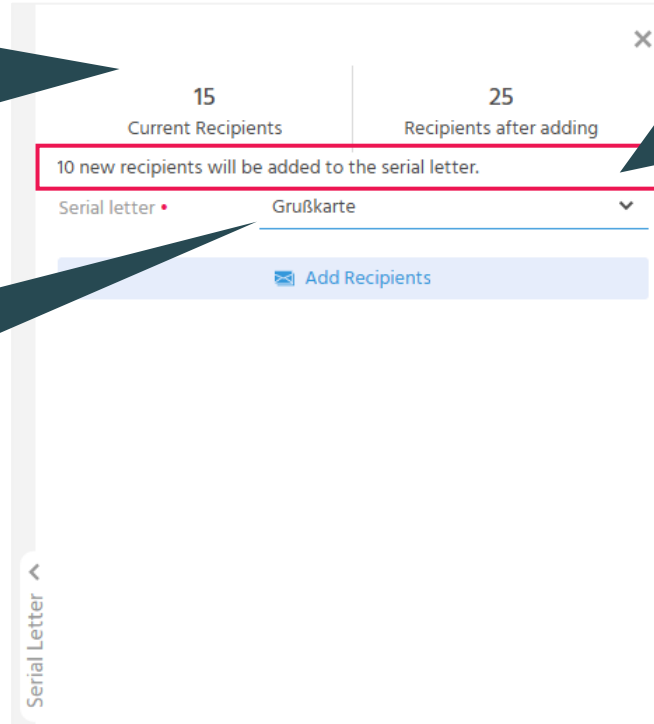
Email	Phone	Address
awate@ertl.de	+49 34772 5711	Parkstraße 6 - DE 04916 Schönewalde
marcel.bader@marselektronikgmbh.de	+49 8142 8910	Puchheimer Straße 2 - DE 82194 Gröbenzell
marcel.bader@marselektronikgmbh.de		Gotthardstraße 1 - DE 80686 München Tor 4
baer@fischer.tr	+49 491 7684643	Brenneckestraße 100 - DE 39116 Magdeburg
barth@rixnerrupp.de	+49 6731 368828	Schloßfreiheit 1A - DE 19288 Ludwigslust
anton.bauer@gmx.de		Obere Mühlbrücke 2 - DE 96049 Bamberg
bauer@rixnerrupp.de	+49 911 229635	Schloßfreiheit 1A - DE 19288 Ludwigslust
m.baumgartner@skyscraper-bau.de	+49 711 8754-22	Rathausallee 50 - DE 22846 Norderstedt

Excursus to the Contexts „Contact“/“Company“

Adding recipients by Serial Action

This displays how many recipients have already been added to the serial letter and the number it will be after adding them.

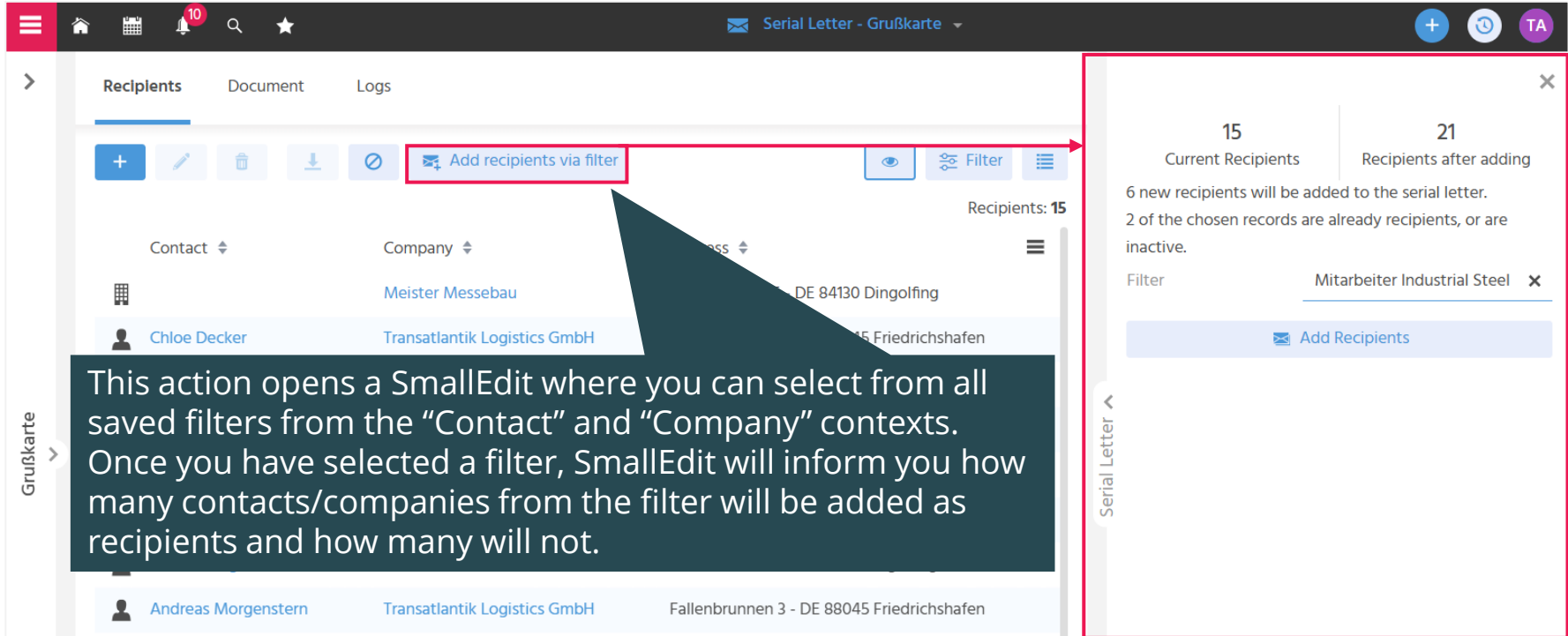
Selection of the previously created **datasets** in the Context „Serial letter“.



In **Hint**, you will be informed of the number of new recipients added to the serial letter, as well as any recipients who could not be added (due to already being on the list or having an advertising ban).

Serial letter

Add recipients via filter



The screenshot displays the ADITO Serial Letter interface. The top navigation bar includes a hamburger menu, home, calendar, notifications (10), search, and star icons. The main header shows 'Serial Letter - Grußkarte' with a dropdown arrow and three action buttons: '+', a clock icon, and 'TA'.

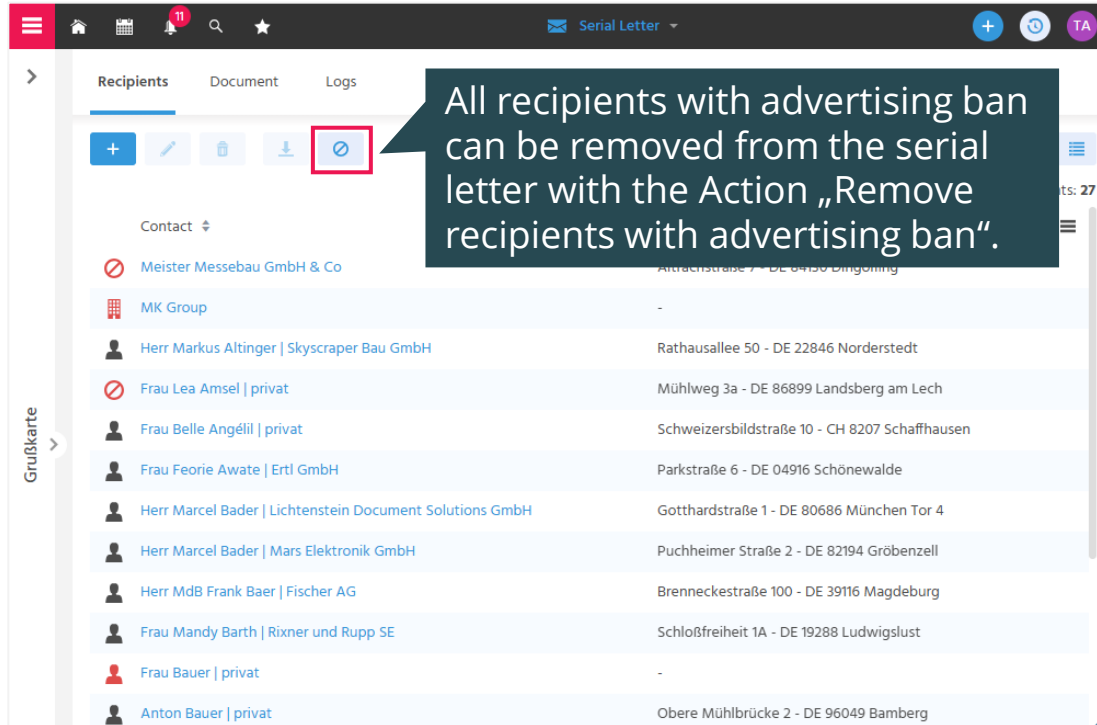
The main content area has tabs for 'Recipients', 'Document', and 'Logs'. Below the tabs is a toolbar with icons for adding, editing, deleting, downloading, and a circled 'X' icon. The 'Add recipients via filter' button is highlighted with a red box and a red arrow pointing to the right. Below the toolbar, there are dropdown menus for 'Contact' and 'Company', and a list of recipients. The list includes 'Chloe Decker' and 'Transatlantik Logistics GmbH'.

A dark blue text box with white text is overlaid on the interface, stating: 'This action opens a SmallEdit where you can select from all saved filters from the "Contact" and "Company" contexts. Once you have selected a filter, SmallEdit will inform you how many contacts/companies from the filter will be added as recipients and how many will not.'

On the right side, a summary panel is visible, showing the number of 'Current Recipients' (15) and 'Recipients after adding' (21). It also indicates that '6 new recipients will be added to the serial letter. 2 of the chosen records are already recipients, or are inactive.' The panel includes a 'Filter' dropdown set to 'Mitarbeiter Industrial Steel' and an 'Add Recipients' button.

Serial letter

Recipient management in the tab „Recipient“



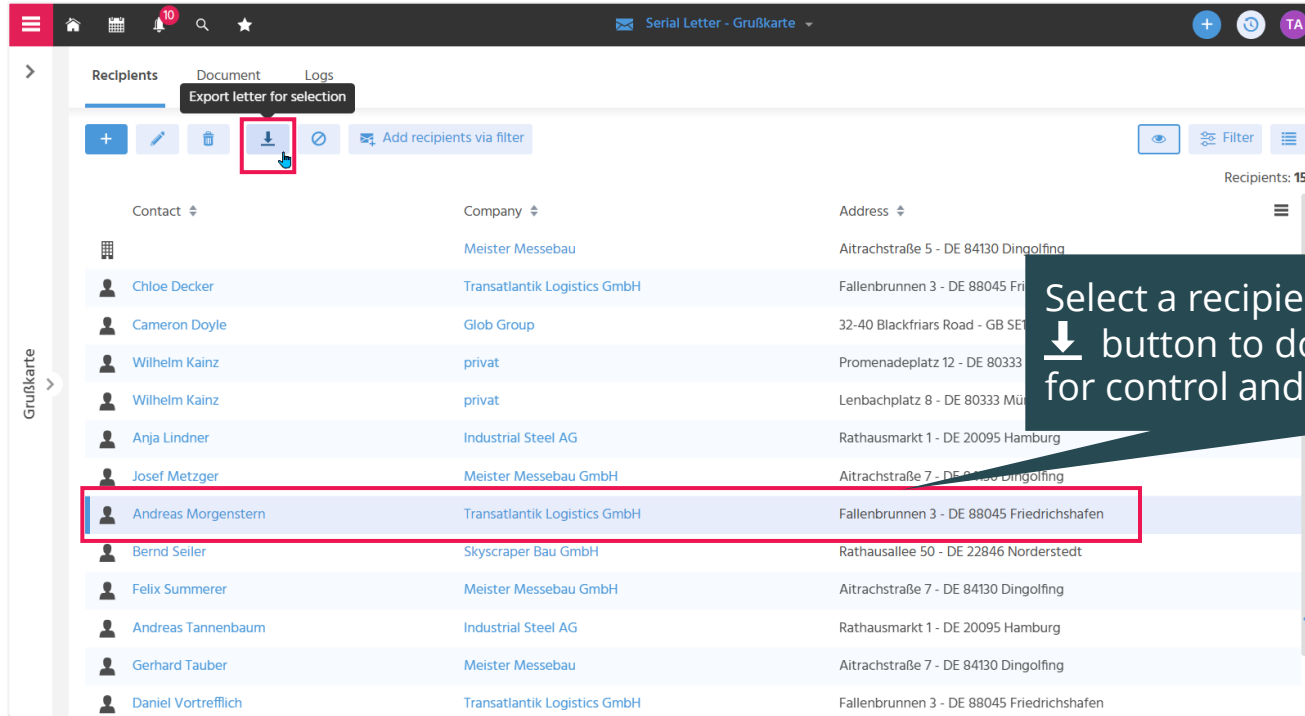
All recipients with advertising ban can be removed from the serial letter with the Action „Remove recipients with advertising ban“.

Contact	Address
Meister Messebau GmbH & Co	Aktienstraße 7 - DE 64150 Dingolfing
MK Group	-
Herr Markus Altinger Skyscraper Bau GmbH	Rathausallee 50 - DE 22846 Norderstedt
Frau Lea Amsel privat	Mühlweg 3a - DE 86899 Landsberg am Lech
Frau Belle Angélie privat	Schweizersbildstraße 10 - CH 8207 Schaffhausen
Frau Feorie Awate Ertl GmbH	Parkstraße 6 - DE 04916 Schönewalde
Herr Marcel Bader Lichtenstein Document Solutions GmbH	Gotthardstraße 1 - DE 80686 München Tor 4
Herr Marcel Bader Mars Elektronik GmbH	Puchheimer Straße 2 - DE 82194 Gröbenzell
Herr MdB Frank Baer Fischer AG	Brenneckestraße 100 - DE 39116 Magdeburg
Frau Mandy Barth Rixner und Rupp SE	Schloßfreiheit 1A - DE 19288 Ludwigslust
Frau Bauer privat	-
Anton Bauer privat	Obere Mühlbrücke 2 - DE 96049 Bamberg

- The icon  shows that an **advertising ban** for the **channel „Address“** has been set in Contact/Company“. The recipient will therefore not be added in the serial letter.
- The icons  or  show that for this contact or company, no address has been added.

Serial letter

Download an individual letter



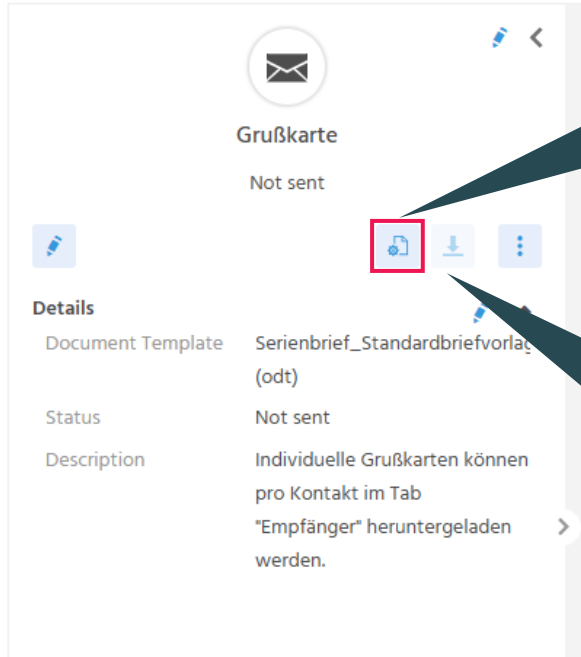
Recipients: 15

Contact	Company	Address
Chloe Decker	Transatlantik Logistics GmbH	Fallenbrunnen 3 - DE 88045 Friedrichshafen
Cameron Doyle	Glob Group	32-40 Blackfriars Road - GB SE1
Wilhelm Kainz	privat	Promenadeplatz 12 - DE 80333 München
Wilhelm Kainz	privat	Lenbachplatz 8 - DE 80333 München
Anja Lindner	Industrial Steel AG	Rathausmarkt 1 - DE 20095 Hamburg
Josef Metzger	Meister Messebau GmbH	Aitrachstraße 7 - DE 84130 Dingolfing
Andreas Morgenstern	Transatlantik Logistics GmbH	Fallenbrunnen 3 - DE 88045 Friedrichshafen
Bernd Seiler	Skyscraper Bau GmbH	Rathausallee 50 - DE 22846 Norderstedt
Felix Summerer	Meister Messebau GmbH	Aitrachstraße 7 - DE 84130 Dingolfing
Andreas Tannenbaum	Industrial Steel AG	Rathausmarkt 1 - DE 20095 Hamburg
Gerhard Tauber	Meister Messebau	Aitrachstraße 7 - DE 84130 Dingolfing
Daniel Vortrefflich	Transatlantik Logistics GmbH	Fallenbrunnen 3 - DE 88045 Friedrichshafen

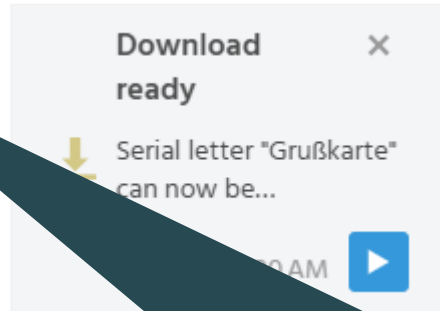
Select a recipient and click on the  button to download this **single letter** for control and further processing.

Serial letter

Create and download letter



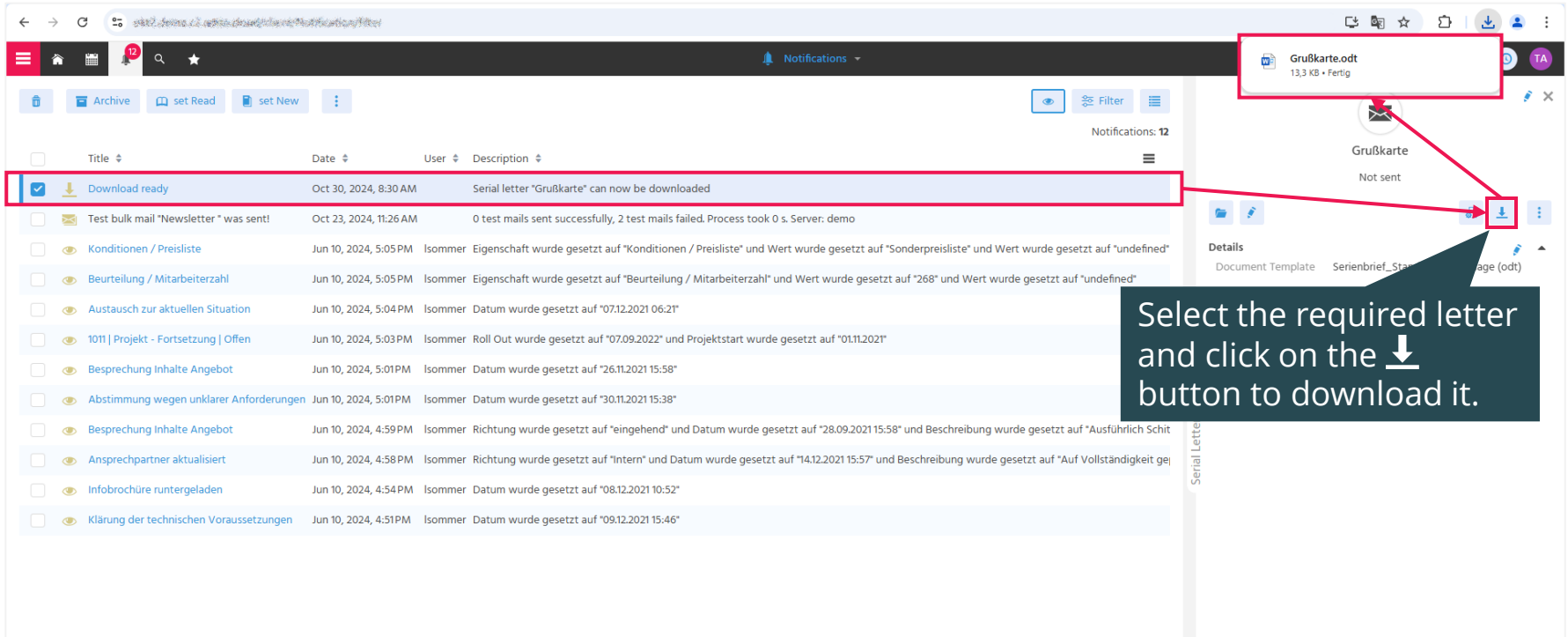
1. Click on the Action „**Generate letter**“ to generate the letter with all recipients (the process runs in the background). As soon as the letter is ready for download, you will be notified.



2. Click on the  button to download the letter. Or open the Context „Notifications“ (see next slide).

Serial letter

Context „Notifications“: download letter



The screenshot shows the ADITO web interface. At the top, there's a navigation bar with a menu icon, home, calendar, and a notification bell icon with a red badge showing '12'. Below this is a toolbar with 'Archive', 'set Read', and 'set New' buttons. The main content area displays a table of notifications. The first row is highlighted with a red box and contains a checkmark, a download icon, and the text 'Download ready'. The description for this notification is 'Serial letter "Grußkarte" can now be downloaded'. To the right of the table, there's a sidebar showing details for the selected notification. It includes a file icon, the name 'Grußkarte.odt', its size '13,3 KB', and status 'Fertig'. Below this, it says 'Grußkarte' and 'Not sent'. At the bottom of the sidebar, there's a 'Details' section with tabs for 'Document Template', 'Serienbrief_Ste...', and 'age (odt)'. A red arrow points from the download icon in the notification row to the download button in the sidebar. A dark blue callout box with white text is overlaid on the bottom right, stating: 'Select the required letter and click on the ↓ button to download it.'

	Title	Date	User	Description
☒	Download ready	Oct 30, 2024, 8:30 AM		Serial letter "Grußkarte" can now be downloaded
☐	Test bulk mail "Newsletter" was sent!	Oct 23, 2024, 11:26 AM		0 test mails sent successfully, 2 test mails failed. Process took 0 s. Server: demo
☐	Konditionen / Preisliste	Jun 10, 2024, 5:05 PM	Isommer	Eigenschaft wurde gesetzt auf "Konditionen / Preisliste" und Wert wurde gesetzt auf "Sonderpreisliste" und Wert wurde gesetzt auf "undefined"
☐	Beurteilung / Mitarbeiterzahl	Jun 10, 2024, 5:05 PM	Isommer	Eigenschaft wurde gesetzt auf "Beurteilung / Mitarbeiterzahl" und Wert wurde gesetzt auf "268" und Wert wurde gesetzt auf "undefined"
☐	Austausch zur aktuellen Situation	Jun 10, 2024, 5:04 PM	Isommer	Datum wurde gesetzt auf "07.12.2021 06:21"
☐	1011 Projekt - Fortsetzung Offen	Jun 10, 2024, 5:03 PM	Isommer	Roll Out wurde gesetzt auf "07.09.2022" und Projektstart wurde gesetzt auf "01.11.2021"
☐	Besprechung Inhalte Angebot	Jun 10, 2024, 5:01 PM	Isommer	Datum wurde gesetzt auf "26.11.2021 15:58"
☐	Abstimmung wegen unklarer Anforderungen	Jun 10, 2024, 5:01 PM	Isommer	Datum wurde gesetzt auf "30.11.2021 15:38"
☐	Besprechung Inhalte Angebot	Jun 10, 2024, 4:59 PM	Isommer	Richtung wurde gesetzt auf "eingehend" und Datum wurde gesetzt auf "28.09.2021 15:58" und Beschreibung wurde gesetzt auf "Ausführlich Schit"
☐	Ansprechpartner aktualisiert	Jun 10, 2024, 4:58 PM	Isommer	Richtung wurde gesetzt auf "intern" und Datum wurde gesetzt auf "14.12.2021 15:57" und Beschreibung wurde gesetzt auf "Auf Vollständigkeit ge"
☐	Infobroschüre heruntergeladen	Jun 10, 2024, 4:54 PM	Isommer	Datum wurde gesetzt auf "08.12.2021 10:52"
☐	Klärung der technischen Voraussetzungen	Jun 10, 2024, 4:51 PM	Isommer	Datum wurde gesetzt auf "09.12.2021 15:46"

Serial letter

Adding recipients subsequently

More recipients can be added subsequently to the serial letter.

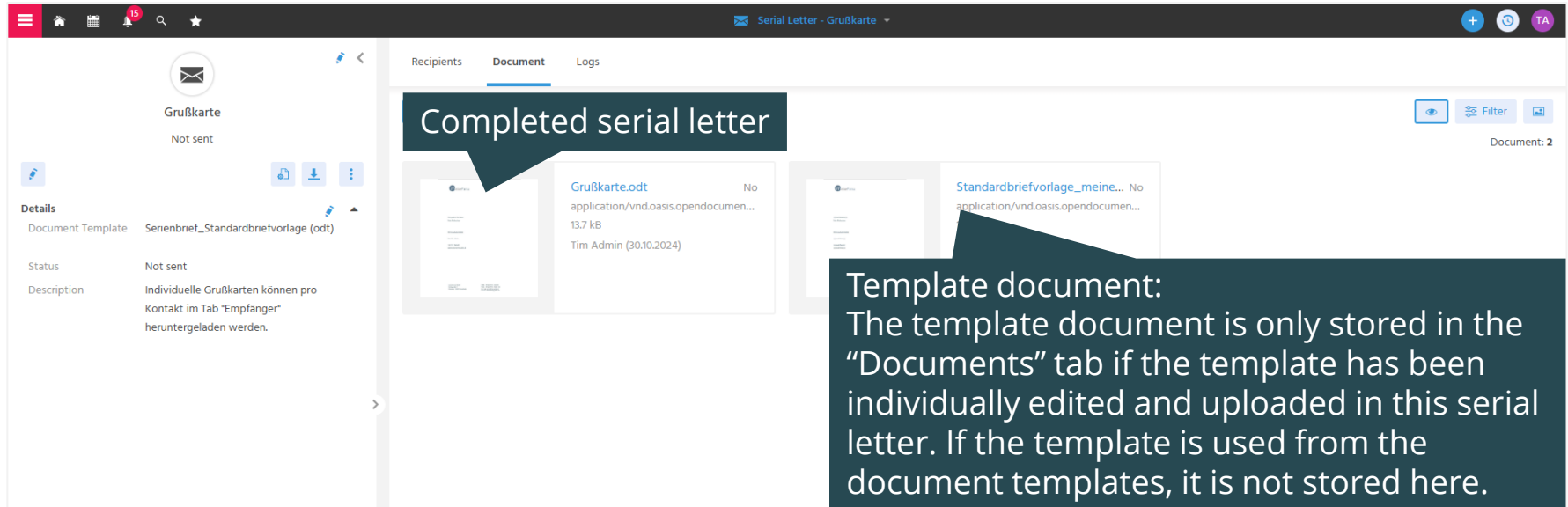
As soon as something changes with the recipients, the serial letter has to be **newly created** and downloaded.

- The existing version of the serial letter in the "Documents" tab will be replaced **by the latest version**.

Serial letter

Managing documents

This tab includes the **latest versions** of the serial letter, which contains all personalized letters for the recipients.



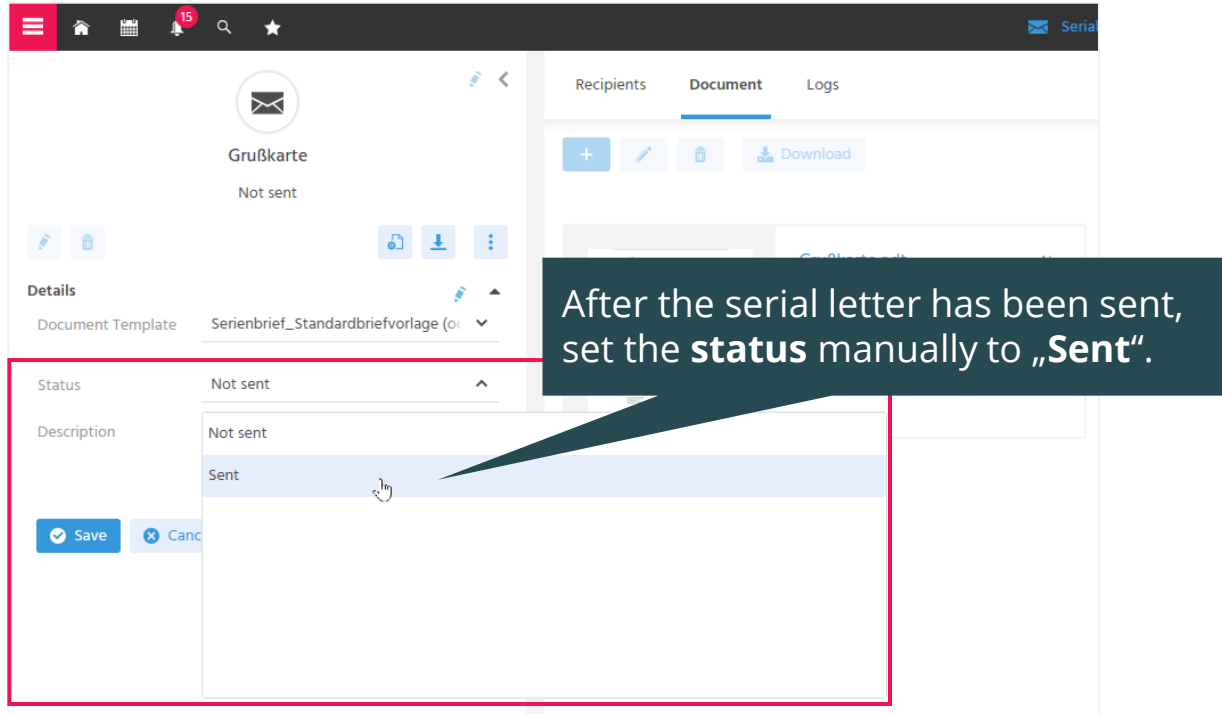
The screenshot shows the ADITO Serial Letter management interface. The top navigation bar includes a menu icon, home, calendar, notifications (15), search, and a star icon. The main header displays 'Serial Letter - Grußkarte' with a dropdown arrow and user avatars. The left sidebar shows a 'Grußkarte' card with a 'Not sent' status and a 'Details' section for 'Serienbrief_Standardbriefvorlage (odt)'. The main content area has tabs for 'Recipients', 'Document', and 'Logs'. The 'Document' tab is active, showing a list of documents. A dark blue callout box labeled 'Completed serial letter' points to a document card for 'Grußkarte.odt' (13.7 kB, Tim Admin (30.10.2024)). Another dark blue callout box labeled 'Template document:' explains that template documents are only stored in the 'Documents' tab if they have been individually edited and uploaded; otherwise, they are not stored here. The interface also includes a 'Filter' button and a 'Document: 2' indicator.

Completed serial letter

Template document:
The template document is only stored in the "Documents" tab if the template has been individually edited and uploaded in this serial letter. If the template is used from the document templates, it is not stored here.

Serial letter

Adjusting status



The screenshot displays the ADITO Serial letter interface. The top navigation bar includes a menu icon, home, calendar, notifications (15), search, and star icons. The main content area is divided into three tabs: Recipients, Document (selected), and Logs. The Document tab shows a 'Grußkarte' document with a 'Not sent' status. A 'Details' section below shows the 'Document Template' as 'Serienbrief_Standardbriefvorlage (o)'. A modal window is open for adjusting the status, with a dropdown menu showing 'Not sent' and 'Sent'. The 'Sent' option is highlighted, and a hand cursor is pointing at it. A dark blue callout box with white text says: 'After the serial letter has been sent, set the **status** manually to „Sent“'. At the bottom of the modal, there are 'Save' and 'Cancel' buttons.

After the serial letter has been sent, set the **status** manually to „Sent“.

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